

Grantee: Marion County, FL

Grant: B-11-UN-12-0011

October 1, 2019 thru December 31, 2019 Performance Report

Grant Number: B-11-UN-12-0011	Obligation Date:	Award Date:
Grantee Name: Marion County, FL	Contract End Date: 03/10/2014	Review by HUD: Reviewed and Approved
Grant Award Amount: \$4,589,714.00	Grant Status: Active	QPR Contact: No QPR Contact Found
LOCCS Authorized Amount: \$4,589,714.00	Estimated PI/RL Funds: \$8,000,000.00	
Total Budget: \$12,589,714.00		

Disasters:

Declaration Number

No Disasters Found

Narratives

Summary of Distribution and Uses of NSP Funds:

Marion County will prioritize the use of NSP3 funds by first targeting areas of greatest need. Funds will primarily be used for stabilization and improvement of property values, to increase homeownership and attract new residents to reduce the number of vacant homes in the area. Marion County will identify non-profit and/or for-profit affordable housing developers through a formal RFP/RFQ process to acquire and rehabilitate foreclosed, abandoned homes in target areas and identify eligible homebuyers. Preference will be given to developers utilizing local contractors, subs, labor and material suppliers. Partnership with agencies such as Habitat for Humanity, USDA Rural Development and Florida Low-Income Housing will provide homeownership opportunities for households at or below 50% of MFI. Some of the NSP3 activities anticipate returning funds (program income) which will continue to be used for NSP activities. Marion County intends to use NSP funds and program income (to include activity delivery costs) for the following activities: 1. Marion County will use up to 10% of the NSP grant and up to 10% of any program income generated through NSP activities for administration of the program. 2. Marion County will engage in Acquisition/Rehabilitation and Resale of targeted area homes to income-eligible homebuyers. This will be Marion County's primary use of NSP funds. At least 25% of funds in this activity go to households at or below 50% MFI. 3. Demolition of units that are blighted and considered a major concern in the redevelopment effort of the area. Marion County will use up to \$100,000.00 toward demolition. 4. Marion County will provide Purchase and Rehabilitation Assistance to clients in the form of down-payment and closing cost assistance. Marion County has budgeted an estimated 11% of the initial NSP3 grant funds toward assistance.

How Fund Use Addresses Market Conditions:

Marion County will prioritize the use of NSP funds pursuant to the Housing and Economic Recovery Act of 2008 by first targeting areas of greatest need as evidenced through HUD and local data. Initially targeted areas will be in those areas that meet the following criteria: 1. greatest percentage of home foreclosures (areas with 25 or more foreclosed, abandoned and vacant homes per 3 sq. miles), 2. areas with the greatest percentage of subprime loans (most likely to face a significant rise in the rate of home foreclosures), 3. greatest number of foreclosed, abandoned and vacant properties causing significant blight/impact and higher crime rates according to local code and law enforcement, 4. areas where the cost to purchase and rehabilitate the homes would fit the required target income groups. Other considerations were based on public input gathered through local realtors and public meetings. Those considerations included identifying areas where target income buyers were interested in purchasing homes and areas small enough to have a significant impact, yet large enough to have sufficient eligible and viable properties.

Ensuring Continued Affordability:

To ensure long-term affordability, Marion County will follow HOME guidelines and the minimum affordability period as found at 92.254. NSP funds left in the project will be as a non-interest bearing, 30 year, deferred payment loan secured with a mortgage/lien document and recorded against the property. Marion County's recapture provision requires repayment upon sale, refinance or if the unit assisted is no longer the homeowner's primary residence. If the homeowner defaults on the loan voluntarily or by operation of law, including but not limited to death of the surviving mortgage holder or foreclosure, the assisted amount will be recaptured from net proceeds.

Definition of Blighted Structure:

Any vacant, abandoned or foreclosed structure that is determined to be substandard and not suitable for rehabilitation.  
A dwelling will be considered sub-standard, not suitable for rehabilitation if it has major defects requiring a great deal of correction, and the cost estimate for repairs exceeds 65% of the value of a comparable replacement unit as obtained from one or more licensed contractors.

Definition of Affordable Rents:

For any NSP-funded rental activity, "affordable rents" shall be defined as 30% of the household's adjusted income, less utility allowances as adopted by the Ocala Housing Authority Section 8 program, as appropriate. The maximum Affordable Rents shall not exceed the Fair Market Rents (FMR) as published annually by the U.S. Department of Housing and Urban Development for the Ocala-Marion County Metropolitan Statistical Area (MSA).

Housing Rehabilitation/New Construction Standards:

Marion County has written Minimum Rehabilitation Standards. These rehabilitation standards follow the 2007 Florida Building Code, Housing Quality Standards, Lead Based Paint Standards and FHA Standards.  
1. Substandard conditions, as defined in the written standards, must be corrected and the dwelling must meet minimum HUD Standards.  
2. An assessment form, which is included in the written standards, must be used as part of the work write-up and completed by a trained housing specialist to identify and justify any repairs or replacements.  
3. Energy efficiency modifications are encouraged when items are being replaced and are cost effective. Requirements and suggestions are identified in the written standards.

Vicinity Hiring:

Marion County certifies that it will, to the maximum extent feasible, provide for hiring of employees that reside in the vicinity of NSP3 funded projects or contract with small businesses that are owned and operated by persons residing in the vicinity of NSP3 projects.

Procedures for Preferences for Affordable Rental Dev.:

Marion County does not intend to use NSP3 funds for rental development.

Grantee Contact Information:

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Overall	This Report Period	To Date
Total Projected Budget from All Sources	N/A	\$9,245,210.11
Total Budget	\$0.00	\$9,245,210.11
Total Obligated	\$0.00	\$9,245,210.11
Total Funds Drawdown	\$0.00	\$5,851,809.45
Program Funds Drawdown	\$0.00	\$4,589,714.00
Program Income Drawdown	\$0.00	\$1,262,095.45
Program Income Received	\$0.00	\$1,262,095.45
Total Funds Expended	\$0.00	\$5,374,412.77
Most Impacted and Distressed Expended	\$0.00	\$0.00
Match Contributed	\$0.00	\$0.00

## Progress Toward Required Numeric Targets

Requirement	Target	Actual
Overall Benefit Percentage (Projected)		0.00%
Overall Benefit Percentage (Actual)		0.00%
Minimum Non-Federal Match	\$0.00	\$0.00
Limit on Public Services	\$688,457.10	\$0.00
Limit on Admin/Planning	\$458,971.40	\$374,344.67
Limit on Admin	\$0.00	\$374,344.67
Most Impacted and Distressed Threshold (Projected)	\$0.00	\$0.00
Progress towards LH25 Requirement	\$3,147,428.50	\$5,054,710.87

## Overall Progress Narrative:

Had change over in staff working with HUD TA to close out NSP 1 & 3 and all update will be provided in the QPR 3.31.2020.

## Project Summary

Project #, Project Title	This Report	To Date	
	Program Funds Drawdown	Project Funds Budgeted	Program Funds Drawdown
NSP3-P1, Program Administration	\$0.00	\$708,971.00	\$223,423.61
NSP3-P2, Acquisition/Rehabilitation/Resale	\$0.00	\$8,500,000.00	\$4,333,828.12
NSP3-P3, Demolition of Blighted Structures	\$0.00	\$100,000.00	\$32,462.27

Activities

Project # / NSP3-P2 / Acquisition/Rehabilitation/Resale

Grantee Activity Number:	NSP3-2B
Activity Title:	Habitat LH25

Activitiy Category:	Activity Status:
Rehabilitation/reconstruction of residential structures	Under Way
Project Number:	Project Title:
NSP3-P2	Acquisition/Rehabilitation/Resale
Projected Start Date:	Projected End Date:
01/01/2016	07/01/2018
Benefit Type:	Completed Activity Actual End Date:
Direct ( HouseHold )	
National Objective:	Responsible Organization:
NSP Only - LH - 25% Set-Aside	Marion County

Overall	Oct 1 thru Dec 31, 2019	To Date
Total Projected Budget from All Sources	N/A	\$141,637.83
Total Budget	\$0.00	\$141,637.83
Total Obligated	\$0.00	\$141,637.83
Total Funds Drawdown	\$0.00	\$141,637.83
Program Funds Drawdown	\$0.00	\$0.00
Program Income Drawdown	\$0.00	\$141,637.83
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$0.00	\$0.00
Marion County	\$0.00	\$0.00
Most Impacted and Distressed Expended	\$0.00	\$0.00
Match Contributed	\$0.00	\$0.00

Activity Description:  
Acquisiton and Resale to LMI residents

Location Description:  
Shores and Marion Oaks

Activity Progress Narrative:

Accomplishments Performance Measures

No Accomplishments Performance Measures

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources	Amount
No Other Funding Sources Found	
Total Other Funding Sources	

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